



FOR IMMEDIATE RELEASE

**Fulcrum Partners Offers Services to CPAs and CPA Firms through the
BDO Alliance USA Marketplace**

PONTE VEDRA BEACH, FL -- (October 13, 2020) On October 1, when the BDO Alliance USA Marketplace went live, [Fulcrum Partners](#), a leading executive benefits advisory, was a well-represented and active participant. "We are excited," said Managing Director & Partner [Bruce Brownell](#), "to better communicate to the CPAs and CPA firms that are members of the BDO Alliance, the types of services we offer them for their clients. The

Marketplace as a feature of the BDO Alliance USA portal, aggregates member products and services as a single, easily searchable resource.”

Six key services from Fulcrum Partners are now represented on the BDO Alliance USA Marketplace:

- [Nonqualified Deferred Compensation – Plan design, implementation, and investment advisory](#)
- [Executive Life & Disability Income Benefit Restoration Plans](#)
- [Supplemental Executive Retirement Plan \(SERP\) Plan Design Strategies for C-Suite Executives](#)
- [Split Dollar Life Insurance Strategies to Retain & Reward Key Talent](#)
- [Estate Liquidity and Wealth Transfer Planning](#)
- [Business Owner Buy/Sell Agreements & Owner Succession Planning](#)

“The BDO Alliance USA portal is an exclusive platform,” said Managing Director & Partner [Scott Cahill](#), “and is a venue Fulcrum Partners proudly serves. We bring more than 30 years of executive benefits consulting experience to the table, plus the latitude to be agile and independent. We partner flexibly with CPA firms, positioning them to expand their offerings and better support their clients in ways that are creative, customized and reliable.”

Fulcrum Partners became an Independent Member of the BDO Alliance USA in 2017. With more than \$7 billion in assets under care, Fulcrum Partners is one of the nation's largest, privately held, executive benefits consultancies. Learn more about the team and the services of Fulcrum Partners by following [*Deferred Compensation News*](#).

About Fulcrum Partners LLC:

Fulcrum Partners (fulcrumpartnersllc.com) is a wholly independent, member-owned firm dedicated to helping organizations enhance their Total Rewards Strategy. Founded in 2007, today the company has offices in Atlanta, Georgia; Chicago, Illinois; Charleston, South Carolina; Columbus and Cleveland, Ohio; Delray Beach, Orlando and Ponte Vedra Beach, Florida; Honolulu, Hawaii; Los Angeles and Newport Beach, California; Portland, Oregon; Salt Lake City, Utah and Washington D.C.

About BDO Alliance USA:

The BDO Alliance USA is a nationwide association of independently owned local and regional accounting, consulting and service firms with similar client service goals. The BDO Alliance USA presents an opportunity for these firms, by accessing the resources of BDO USA, LLP and other Alliance members, to expand services to their clients without jeopardizing their existing relationships or their autonomy. The BDO Alliance USA was developed to provide Member firms with an alternative strategy for gaining competitive advantage in the face of a changing business landscape. The

Alliance represents an opportunity for BDO to enhance relationships with reputable firms that share a mutual business understanding. The BDO Alliance USA is a subsidiary of BDO USA, LLP, a Delaware limited liability partnership.

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CONTACT:

Bruce Brownell

904.296.2563

press@fulcrumpartnersllc.com